

**INSTRUCTIONS FOR COMPLETING THE ETHNICITY, RACE AND INCOME SECTIONS OF FORM HUD-9902 REVISED 10/2002**

**ETHNICITY AND RACE - SECTIONS 3 AND 4**

Grant	All Counseling Activities	HUD Activities
<b>3. Ethnicity of Clients</b> (select only one)		
a. Hispanic		
b. Not Hispanic		
<b>4. Race of Clients</b>		
<b>Single Race</b>		
a. American Indian/Alaskan Native		
b. Asian		
c. Black or African American		
d. Native Hawaiian or Other Pacific Islander		
e. White		
<b>Multi-Race</b>		
f. American Indian or Alaska Native <b>and</b> White		
g. Asian <b>and</b> White		
h. Black or African American <b>and</b> White		
i. American Indian or Alaska Native <b>and</b> Black or African American		
j. Other multiple race		

For each counseling activity you record, **select one under Section 3 and one under section 4.**

Record ethnic/racial data for **both** those attending education workshops and those who receive more in-depth counseling. Ideally the number of households counted in the ethnicity/race sections would equal the total number counseled.

Ethnicity/Race categories have been revised by the Office of Management and Budget to standardize them across the Federal government.

The two ethnic categories as revised by the Office of Management and Budget (OMB) are:

- **Hispanic or Latino.** A person of Cuban, Mexican, Puerto Rican, South, or Central American, or other Spanish culture or origin, regardless of race. The term “Spanish origin,” can be used in addition to “Hispanic” or “Latino.”

- **Not Hispanic or Latino.** A person not of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin, regardless of race.

The five single race categories as revised by the Office of Management and Budget are defined as follows:

- **American Indian or Alaska Native.** A person having origins in any of the original peoples of North and South America (including Central America), and who maintains tribal affiliation or community attachment.
- **Asian.** A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.
- **Black or African American.** A person having origins in any of the black racial groups of Africa. Terms such as “Haitian” or “Negro” can be used in addition to “Black” or “African American”.
- **Native Hawaiian or Other Pacific Islander.** A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.
- **White.** A person having origins in any of the original peoples of Europe, the Middle East, or North Africa.

The five multi-race categories as revised by the Office of Management and Budget are:

- **American Indian or Alaska Native *and* White**
- **Asian *and* White**
- **Black or African American *and* White**
- **American Indian or Alaska Native *and* Black or African American**
- **Other – the balance of individuals reporting more than one race**

Note: Hispanic or Latino is an ethnicity. It is NOT a race. Hispanics and Latinos would be racially classified as White, American Indian or Alaska Native, Asian, Black or African American, Native Hawaiian or Other Pacific Islander or multi-race (such as a Black Cuban).

Self-reporting or self-identification, rather than observer identification is the preferred method for collecting race and ethnicity data. Self-identification means that responses are based on self-perception. If you are required to provide HUD with race and ethnicity data, you must collect the data asking separate questions for race and for ethnicity. Furthermore, when collecting data the ethnicity question should precede the question about race. The Office of Management and Budget has recommended this sequence because pre-tests conducted by the U.S. Census Bureau found that placing ethnicity before race significantly reduced the non-response rate to the ethnicity question.

**INCOME LEVELS – SECTION 5**

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Grant	All Counseling Activities	HUD Activities
5. Income Levels		
a. <50% of Area Median Income (AMI)		
b. 50–80% of AMI		
c. 80–100% of AMI		
d. >100% of AMI		

For each counseling activity, the client will be counted based on their income as a percentage of the Area Median Income (AMI) adjusted for family size. Again, the number of households counted in Section 5 should equal the total number counseled.

To find the Fiscal Year 2005 income levels in a specific geographical area, go to the HUD USER website:

<http://www.huduser.org/datasets/il/fmr05/index.html>

When fiscal year 2006 income levels are available, go to:

<http://www.huduser.org/datasets/il/fmr06/index.html>

HUD USER - FY2005 Income Limits - Microsoft Internet Explorer

Address: http://www.huduser.org/datasets/ii/05/index.html

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# FY 2005 Income Limits

The effective date is February 11, 2005.

**Median Family Incomes:**

Transmittal Notice on Estimated Median Family Incomes for FY 2005, State Median Family Incomes in [pdf](#)  
Tables for 1999 and Estimated 2005 Decile Distributions by Metropolitan Statistical Areas and Non Metropolitan Counties in [pdf](#) and [MS WORD](#)

**Income Limits**

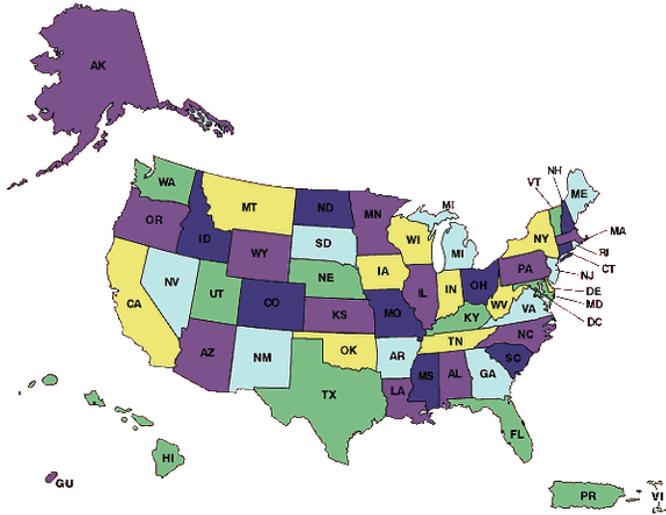
FY 2005 Income Limits Briefing Material in [pdf](#)  
Income Limit Area Definition in [pdf](#) and [MS WORD](#)  
Transmittal Notice of FY 2005 Income Limits for the Public Housing and Section 8 Programs in [pdf](#)  
Tables for Section 8 Programs in [pdf](#) and [MS WORD](#)  
Data for Section 8 Programs in [MS EXCEL](#)  
Transmittal Notice of FY 2005 Income Limits for the Section 221(d)(3) BMIR, Section 235 and Section 236 Programs in [pdf](#)  
Tables for Section 221(d)(3) BMIR, Section 235 and Section 236 Programs in [pdf](#) and [MS WORD](#)

To view Income Limits for Section 8 Programs and Median Family Income information for a given county or a specific State, in **pdf** format, go to the U.S. map below and click on the State you are interested in.




HUD USER - FY2005 Income Limits - Microsoft Internet Explorer

Address: http://www.huduser.org/datasets/ii/05/index.html



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Some of the information in this section is available for downloading in the Adobe Portable Document Format (PDF) which allows the document to be downloaded, viewed, and printed

**SAMPLE:** Click on the State of Kansas and find the Kansas City MSA

STATE: KANSAS -----I N C O M E----- L I M I T S-----

MSA : Kansas City, MO-KS

FY 2005 MEDIAN FAMILY INCOME: \$68,400 (FOR A FAMILY OF 4)

PROGRAM	1 PERSON	2 PERSON	3 PERSON	4 PERSON	5 PERSON	6 PERSON	7 PERSON	8 PERSON
30% of Median 27100	14350	16400	18450	20500	22150	23800	25450	
Very Low (50%) 45150	23950	27350	30800	34200	36950	39650	42400	
Low-Income (80%) 72250	38300	43800	49250	54700	59100	63500	67850	

As an example, your first client is a family of 2 with an annual income of \$30,000. From the chart above, you can see that 30% of the Area Median Income (AMI) for a family of 2 is \$16,400. 50% of the AMI for a family of 2 is \$27,350. 80% of AMI for a family of 2 is \$43,800. To determine 100% of AMI for a family of 2, you can use the 80% figure and divide it by .80:  $\$43,800 / .80 = \$54,750$ . Therefore, your first client with a family income of \$30,000 would be counted in Section 5b of form HUD-9902 as "50-80% of AMI".

- 30% Family of 2 = \$16,400
  - 50% Family of 2 = \$27,350
  - 80% Family of 2 = \$43,800
  - 100% Family of 2 = \$54,750
- First client at \$30,000 is between 50% & 80%

Your second client is a family of 5 with an annual income of \$63,300. From the chart above, you can see that 30% of the Area Median Income (AMI) for a family of 5 is \$22,150. 50% of the AMI for a family of 5 is \$36,950 and 80% of AMI for a family of 5 is \$59,100. To determine 100% of the AMI for a family of 5, use the low-income (80%) figure and divide it by .80:  $\$59,100 / .80 = \$73,875$  or  $\$73,900$  when rounded to the nearest \$50. Therefore, your second client with a family income of \$63,300 would be counted in Section 5c of form HUD-9902 as 80-100% of AMI".

- 30% Family of 5 = \$22,150
  - 50% Family of 5 = \$36,950
  - 80% Family of 5 = \$59,100
  - 100% Family of 5 = \$73,900
- Second client at \$63,300 is between 80% & 100%